# APPENDIX 5 – STAGE 1/2 FORMAL MEETING - ARRANGEMENTS CHECKLIST

This checklist is to act as a reminder for the School when arranging a formal grievance meeting.

|  |  |
| --- | --- |
| **Action** | **Completed** |
| Collate contact list for all attendees |  |
| Arrange dates (Allow 2 days for complex cases - HR to advise) |  |
| Confirm cost centre for costs of grievance meeting |  |
| Arrange location |  |
| Location arrangements:  Main room   * 2 additional rooms - IO, HR Support & Witnesses * - Employee & representative * - Witness waiting room * Refreshments * Lunch * Parking/disabled parking   Payment arrangements (invoices to be sent to etc.) |  |
| Arrange note taker |  |
| Send arrangements confirmation to all |  |
| Bundle arrangements:   * Obtain prepared bundle * Example contents attached * Send to all attendees (Special Delivery if required) * To arrive 5 days before grievance meeting |  |
| Witness support:   * IO/Manager to prepare/support their witnesses before, during and after meeting * Be aware of possible witness anxiety & reluctance * Take into account when arranging room for witnesses to wait in prior to the meeting. |  |
| Post Formal Grievance Meeting Actions:   * Support with decision letter (HR to assist) * Send decision letter normally within 5 working days of formal grievance meeting * Send to individual & copy representative (Special Delivery if required) * Bring forward receipt of minutes of the formal grievance meeting (Hearing Officer/HR) * Bring forward Appeal deadline receipt (HR) |  |
| HR debrief – at next Case Review |  |
| Management debrief (if necessary) |  |